

# INSURANCE MANUAL

ERIC

# Adding a New Insurance Rate

1. Sign into ERIC at <https://eric.mt.gov/perisess/wfmlogini.aspx>
2. From the left side menu bar, choose "Organization"

The screenshot shows the ERIC (MPERA Employer Reporting and Information Center) home page. The left sidebar menu is visible, with 'Organization' highlighted in yellow. The main content area displays a grid of tiles for various functions: Alerts & Messages, Upload File, Employer Reporting, Enroll New Employee, Employee Data, Organization Profile, and Payments. The 'Organization' tile is the focus of the next step.

3. In the "Employer Maintenance" screen choose the tab under "Other Details" titled "Insurance" and click on the "Insurance Org ID" number

The screenshot shows the Employer Maintenance screen. The 'Insurance' tab is selected under the 'Other Details' section. A table lists Insurance Org IDs, Insurance Org Names, Effective Dates, and End Dates. The first row shows ID 8251, Effective Date 07/01/1993, and End Date 12/13/2017.

Insurance Org ID	Insurance Org Name	Effective Date	End Date
8251		07/01/1993	12/13/2017
8449		08/11/2016	

4. On the "Organization Insurance Maintenance" screen , under "Insurance Plans" click on "New"

## Organization Insurance Maintenance

Msg ID : 7 [ Record displayed. Please make changes and press SAVE. ]

Save Refresh

### Organization Information

Organization ID : Organization Name :

### Insurance Details

Insurance Organization ID : 5112

\*Insurance Organization : 8449

Insurance Organization Name :

\*Effective Date : 08/11/2016

End Date :

Description :

### Insurance Plans

Plan ID : Effective Date : Status :

New Open Export to Excel

5. On the "Organization Insurance Plan Maintenance" screen enter the "Plan Effective Date" and click Save. Do not enter a "Plan End Date". A description is not required. Once you have hit save, under the "Plan Rates" section, you will choose "Add Rate". Enter the "Rate Effective Date" and "Plan Rate" and hit Save. The Plan Effective Rate and Rate Effective Date must be the current date or a future date.

## Organization Insurance Plan Maintenance

Msg ID : 8 [ All changes successfully saved. ]

Save Refresh

### Organization Information

Organization ID : 00000 Organization Name : 00000 Insurance Org ID : 5112

### Insurance Details

Plan ID : 6183

\*Plan Effective Date : 01/08/2019 x Plan End Date : 


Current Plan Rate : \$500.00

Status : Approved

Description :

### Plans Rates

Add Rate Remove Rate Export To Excel

Select	Rate Effective Date	Plan Rate
<input type="checkbox"/>	01/08/2019 	\$500.00

### Other Details

Errors Status History

<input type="checkbox"/>	Message ID	Message	Severity
No records to display			

Create : cv0705

1/8/2019 2:04:25 PM

# Changing an Existing Insurance Rate

1. Sign into ERIC at <https://eric.mt.gov/perisess/wfmlogini.aspx>
2. From the left side menu bar, choose "Organization"

The screenshot shows the ERIC home page. The left sidebar menu is expanded, and the 'Organization' option is highlighted in yellow. The main content area displays a grid of tiles for various functions: Alerts & Messages, Upload File, Employer Reporting, Enroll New Employee, Employee Data, Organization Profile, and Payments. The 'Organization' tile is the focus of the current step.

3. In the "Employer Maintenance" screen choose the tab under "Other Details" titled "Insurance" and click on the "Insurance Org ID" number

The screenshot shows the Employer Maintenance screen. The 'Insurance' tab is selected under the 'Other Details' section. A table lists insurance organizations with columns for Insurance Org ID, Insurance Org Name, Effective Date, and End Date. The first row shows ID 8251, and the second row shows ID 8449.

Insurance Org ID	Insurance Org Name	Effective Date	End Date
8251		07/01/1993	12/13/2017
8449		08/11/2016	

4. On the “Organization Insurance Maintenance” screen, under “Insurance Plans” click on the “Plan ID” of the rate you want to change

## Organization Insurance Maintenance

[ Previous Page Displayed. ]

Save

Refresh

### Organization Information

Organization ID : Organization Name

### Insurance Details

Insurance Organization ID : 5112

\*Insurance Organization : 8449 X

Insurance Organization Name :

\*Effective Date : 08/11/2016

End Date :

Description :

### Insurance Plans

Plan ID : Effective Date : Status : Filter

New

Open

Export to Excel

1

2

	Plan ID	Plan Effective Date	Plan End Date	Current Plan Rate	Future Plan Effective Date	Future Plan Rate	Status
<input type="checkbox"/>	5591	08/31/2016		\$1,500.00		\$0.00	Approved

5. This will bring you to the “Organization Insurance Plan Maintenance” screen. Under “Plan Rates” choose “Add Rate”. This will add another row. Enter the “Rate Effective Date” and “Plan Rate”, then click Save. The Rate Effective Date must be the current date or a future date.

# Organization Insurance Plan Maintenance

Msg ID : 7 [ Record displayed. Please make changes and press SAVE. ]

Save Refresh

## Organization Information

Organization ID : Organization Name : Insurance Org ID : 5112

## Insurance Details

Plan ID : 5591

\*Plan Effective Date : 08/31/2016 x Plan End Date :

Current Plan Rate : \$1,500.00

Status : Approved

Description :

## Plans Rates

Add Rate Remove Rate Export To Excel

Select	Rate Effective Date	Plan Rate
<input type="checkbox"/>	08/31/2016	\$1,350.00
<input type="checkbox"/>	08/31/2016	\$1,350.00
<input type="checkbox"/>	01/08/2019	\$1,500.00

## Other Details

Errors

Status History

Message ID Message Severity

No records to display

# Adding a retiree to Insurance

1. Retiree and employer must first complete the “Health Insurance Authorization” form on MPERA’s website at <http://mpera.mt.gov/RETIREES/Retiree-Forms> and send back to MPERA.
2. Once MPERA has received this form and a retirement application for the person, the employer can add the person to their insurance in ERIC.
3. Sign into ERIC at <https://eric.mt.gov/perisess/wfmlogini.aspx>
4. From the left side menu bar, choose “Insurance”

The screenshot shows the ERIC (MPERA Employer Reporting and Information Center) home page. The left sidebar menu is expanded, and 'Insurance' is highlighted in yellow. The main content area shows a grid of links: Alerts & Messages, Upload File, Employer Reporting, Enroll New Employee, Employee Data, Organization Profile, and Payments.

5. On the “Insurance Maintenance” screen under “Retiree Insurance Results” choose “New”

## Insurance Maintenance

The screenshot shows the Insurance Maintenance screen. It features a 'Retiree Insurance Criteria' section with search filters (Person ID, Insurance Organization, Plan ID, Status) and a 'Retiree Insurance Results' section with buttons for 'New', 'Open', and 'Export To Excel'.



6. You will be routed to the “Retiree Insurance Maintenance” screen. Enter the “Person ID”, “Insurance Organization”, “Plan ID”, and “Effective Date”, then click “Save”. If you do not know the Person ID, click on the magnifying glass next to the blank space and search for the person based on the search criteria. The Effective Date must be the current date or future date.

## Retiree Insurance Maintenance

**Msg ID : 8 [ All changes successfully saved. ]**

Save

Refresh

Void

**Organization Information**

Organization ID : Organization Name :

**Insurance Details**

\*Person ID : .

Person Name: .

\*Insurance Organization : County Insurance

Insurance Organization ID : 8449

\* Plan ID : 6183/500.00

Plan Description :

\*Effective Date : 01/11/2019

\*Current Rate : \$500.00

End Date :

Status : Review

Retiree Insurance ID : 21455

7. Once the person is saved, there are no error messages received, and you have returned to the Insurance Maintenance screen the person that was added should be listed under Retiree Insurance Results and be in a “Pending Batch” status. The batch runs on the night of the 16<sup>th</sup> of each month. Any changes made after this date will not be effective until the following month.